Performance Review Administration Checklist

☐ Be Prepared – know the objectives and goals of the meeting

☐ Time and Place – choose a quiet, private spot with as few interruptions as possible

☐ Conducting the Meeting
  o Create a positive environment and help the employee feel at ease
  o Review key duties and expectations
  o Give balanced feedback on the performance of the stated duties, both positive and negative, but start with the positive
  o Focus on the job, not on the person
  o Ask questions, and allow the employee to provide feedback
  o When discussing areas for improvement, discuss methods and objectives for improving
  o Discuss possibilities for professional development along with the employee’s aspirations

☐ Conclusion
  o Summarize and review the important points of the discussion, including any revisions to the key duties
  o Restate the action steps that have been recommended and provide a time frame for completion
  o Make sure employee reviews the appraisal and provides comments
  o Have employee sign the review to acknowledge that he/she has read it (does not signify agreement with the content)

☐ Follow-Up
  o Follow-up with the employee to see how plans are proceeding within the given timeframe
  o Offer the employee assistance in achieving objectives and encourage discussion of successes and obstacles

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